

BENEFITS PLANNING

A. Definitions

BENEFITS PLANNER ó A person who provides SSA beneficiaries with disabilities access to work incentives planning and assistance services. Benefits Planners assist clients receiving Social Security benefits in making informed choices regarding Social Security Work Incentives and other benefits programs.

BENEFITS PLANNING - The services are designed to better enable SSI and SSDI beneficiaries to make informed choices about work. Benefits Planners who provide work incentives planning and assistance also assess the impact of earning on benefits from other Federal, State, county, local and private agencies and nonprofit organizations that serve beneficiaries with disabilities.

OTHER PROVIDERS OF BENEFITS PLANNING SERVICES - The Social Security Administration has awarded grants to other organizations in Iowa to provide Benefits Planning services at no cost. The Bridge to Employment Project provides services to individuals in Workforce Development Centers in Cedar Rapids and Mason City. The Black Hawk Center for Independent Living has received funding to provide Benefits Planners in Oskaloosa and Sioux City. IVRS counselors are encouraged to use no-cost services whenever available.

BENEFITS SCREENING PROFILE ó IVRS form that a benefits planner completes to determine current level of client's benefits from state, federal and local program and their ability to benefit from Social Security Work Incentives.

PLAN FOR ACHIEVING SELF SUPPORT (PASS) - The PASS is a method of excluding, or not counting, income or resources that a person will use to purchase items to reach a work goal. A PASS proposal must be in writing and submitted to SSA. Anyone can write the PASS, including the person with a disability. The written PASS must contain a specific occupational objective; a list of items to be funded and their cost; the income/resources to go into the PASS; specific savings and disbursement goals; and a timetable for achieving the goal. A PASS proposal must specify an expected level of earnings when the PASS is completed. For SSI beneficiaries, that earning level should be enough to reduce or eliminate dependence on SSI. For SSDI beneficiaries, the earning level should be enough to eliminate dependence on SSDI.

May, 2003



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IMPAIRMENT-RELATED WORK EXPENSES (IRWE) 6 The IRWE allows a person with a disability to deduct expenses that are essential to work from gross earnings when figuring Substantial Gainful Activity. This deduction may allow the person to continue receiving an SSDI or SSI cash benefit.

SUBSIDY 6 Subsidy is support a beneficiary receives from their employer on the job that may result in more pay than the actual value of the work performed. SSA uses only the earnings that represent the real value of the work performed to decide if the work meets the Substantial Gainful Activity level.

- B. Qualifications: To be eligible to take training to become a benefits planner with a service agreement from IVRS, a person must possess the following:
1. Bachelor's Degree in a field related to services with persons with disabilities.
 2. Completion of the required components of the Work Keys Exam.
 3. Proficiency in the use of SSDI and SSI disability programs.
 4. Capability to translate technical information for clients.
 5. Communication skills (ability to understand needs, evaluate alternatives, advise on potential course of action).
 6. Knowledge of public and private benefit systems and local community services including Social Security Administration (SSA) field offices, and work incentives coordinators, (e.g. PASS specialists, Employment Support Representatives).
 7. Ability to interpret Federal and State Laws, regulations, and Administrative Code regarding public benefits.
 8. Knowledge of medical terminology.
 9. Knowledge and practice of professional ethics (e.g. confidentiality, avoidance of conflict of interest, etc.).

In addition, the person must complete the Social Security Administration (SSA) Benefits Planner training. A certificate of completion must be submitted to the IVRS Community Rehabilitation Program Manager.

- C. When Provided: A Benefits Screening Profile is provided to eligible clients, prior to the development of an Individual Plan for Employment, when they need additional information to determine how earnings from employment will affect cash or other benefits they are receiving from disability, housing, food stamp, medical insurance or welfare programs. Referral for development of a Plan for Achieving Self Support, Impairment Related Work Expenses, or

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Subsidy occurs after the development of an Individual Plan for Employment when it is determined that one of these work incentives will assist the client in reaching their vocational goal. When referring to a Benefits Planner, the IVRS counselor should obtain the client's signature on a Release Form to authorize two-way communication with the planner.

- D. Authorization ó Authorizations should be developed at the time the service is needed. It will be rare to authorize for both a Pre-Screening Plan and a PASS Plan, IRWE, or Subsidy at the same time. The Iowa Vocational Rehabilitation Services requires the client to countersign all transportation claims for mileage submitted by the Planner.

E. Required Reports:

Benefits Planners are required to use the Benefits Screening Profile that is emailed to them by the IVRS Counselor. The Counselor is responsible for completing Sections I, II, III, IV, and V prior to emailing to the Benefits Planner.

Benefits Planners are required to use the PASS form for Iowa DVR Vendors Only found at www.RCEP7.org. This form contains the client's authorization for the Social Security Administration PASS Cadre to communicate with the IVRS Counselor.

Copies of the completed Benefits Screening Profile, Narrative Report, and approved PASS, IRWE, or Subsidy forms are to be filed in the Other Evaluation section of the casefile.

Payment Criteria for Service Fees

Pre-Screening Plan: \$315.00

An initial Pre-Screening Plan will be provided to the IVRS counselor and the client. The IVRS Counselor will process a claim upon receipt of the completed Benefits Screening Profile and narrative report.

PASS Drop Outs: \$131.50

If the client drops out of the process between referral and completion of the PASS application, the IVRS counselor will process a claim for payment to the Benefits Planner.

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PASS Plan Submitted: \$131.50

The Benefits Planner submits a draft PASS for review by the IVRS counselor and the Ticket Counselor prior to signature by the client. When the counselor has determined that the PASS Plan is complete, the Benefits Planner obtains the client's signature and sends it to the Social Security Administration (SSA), with a copy to the IVRS counselor, a claim will be processed.

PASS Plan Approved: \$300.00

When the IVRS counselor and the client receive a copy of the SSA PASS approval letter, a claim will be processed to the Benefits Planner.

PASS Plan Amendment: \$157.50

PASS amendments are only written to amend already approved plans. When a PASS amendment or extension is approved by the SSA, the IVRS counselor will process a claim to the Benefits Planner. This fee will be paid for a maximum of one (1) amendment.

IRWE or Subsidy: \$315.00

When the IVRS counselor and the client receive a copy of the IRWE or Subsidy approval letter, payment will be authorized to the Benefits Planner.

Consultation/Follow-along: \$35.00 per hour

The IVRS counselor may, but is not required to, authorize a consultation fee for consultation for one-hour service per month for a maximum of six months. This consultation follow-along is only for clients who have been pre-approved and are receiving PASS, IRWE, or Subsidy benefits. The Benefits Planner will pro-rate the billing for actual services provided. Supporting billing documentation will be submitted to the IVRS referring counselor prior to processing of claim vouchers. The Benefits Planner will:

- Assist the client in budgeting benefits;
- Provide technical support when requested by the client;
- Provide assistance to the client when issues arise relating to benefits.

Mileage: \$.34 per mile

Mileage is only paid for services provided after the client has selected the Benefits Planner and the IVRS counselor has approved the services. When the Benefits Planner is required to travel to provide services to the client, mileage will be authorized for one trip per service provided.

July, 2006



Benefits Planners Agreements

IVRS has agreements with:

Janet R. Bee

Planner: Janet R. Bee Phone: (319) 472-4088
E-mail: buzzjanet@worldnet.att.net
Serving: Benton County

Sandra Christensen

Planner: Sandra Christensen Phone: (515) 233-2602
E-mail: christensen.sandra@mcleodusa.net.
Serving: East Central Area Office

Community Based Services of Bremer County

Planner: Judy Stevenson Phone: (319) 352-2990
E-mail: jstevenson@co.bremer.ia.us
Planner: Michelle Weber E-mail: mweber@co.bremer.ia.us
Serving: Waterloo, Mason City, Iowa City, and Cedar Rapids Area Offices

Svec Vocational Consultants

Planner: Julie Svec Phone: (515) 251-6868
E-mail: jscsvc@mchsi.com
Serving: Cedar Rapids, East Central, Iowa City, Ottumwa, Polk County, and Waterloo Area Offices

Disabled Workers

Planner: Stephen Schrader Phone: (319) 287-5616
E-mail: steven437@mchsi.com
Serving: Waterloo (City only)

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Emergent Consulting

Planner: Tamara J. Prenosil Phone: (563) 583-6031
 E-mail: potpren@mchsi.com
 Serving: Dubuque Area Office

Ginger Novelle

Planner: Genger Novelle
 423 E. Phillip St.
 Des Moines, Iowa 50315

Hays Consulting

Planner: Nancy Hays Phone: (515) 288-5670
 E-mail: haysandco@aol.com
 Serving: Polk Area Office, Northern Warren County

The Prism Group

Planner: Suzanne McKinley Phone: (515) 331-1128
 E-mail: evalu8er@mchsi.com
 Serving: Polk, East Central, and West Central Area Offices

Planner: Jeri Moore Phone: (712) 537-2423
 E-mail: jeri@moore-enterprises.net
 Serving: Statewide

Progress Industries

Planner: Leanne R. Majors Phone:
 E-Mail:
 Serving:

Linda S. Reid

Planner: Linda S. Reid Phone: (563) 583-4363
 E-mail: 61949@loras.edu
 Serving: Dubuque Area Office

July, 2006





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